

- 1) Navigate to the General Information Page: Grants→Sponsors→General Information
- 2) Enter the appropriate values in the following fields

General Info			
SetID: STATE		Sponsor: 000	
General Info Links: ...More			
*Customer Status:	Active	Copy From Customer	Level: Regular
*Date Added:	10/21/2009	*Since:	10/21/2009
*Name 1:			*Type: User 1
Name 2:			
Currency Code:		Rate Type:	
Roles			
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Bill To Customer Bill To Selection </div> <div style="width: 45%;"> <input type="checkbox"/> Correspondence Customer Correspondence Selection </div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Ship To Customer Ship To Selection </div> <div style="width: 45%;"> <input type="checkbox"/> Remit From Customer Remit From Selection </div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Sold To Customer Sold To Selection </div> <div style="width: 45%;"> <input checked="" type="checkbox"/> Corporate Customer Corporate Selection </div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Broker Customer </div> <div style="width: 45%;"> <input type="checkbox"/> Consolidation Customer </div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Indirect Customer </div> <div style="width: 45%;"> <input type="checkbox"/> Grants Management Sponsor </div> </div>			
Consolidation Business Unit:			
Federal Attributes			
<input type="checkbox"/> Federal Customer			
Trading Partner Code:		Disbursing Office:	

Support Teams

[Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Team Code	Default	Description
<input type="text"/>	<input type="checkbox"/>	

[+](#) [-](#)

Address Locations

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*Location:

Description:

☐ Bill To

☐ Primary

☐ Broker

☐ Primary

☐ Ship To

☐ Primary

☐ Indirect

☐ Primary

☐ Sold To

☐ Primary

☐ Correspondence Address

☐ RFID Enabled
 [VAT Default](#)
[VAT Service Treatment Setup](#)

[+](#) [-](#)

Address Details

[Find](#) | [View All](#) | First 1 of 1 Last

*Effective Date:

Tax Code:

*Status:

Physical Nature:

Language Code:

Where Performed:

Country: United States

Address 1:

Address 2:

Address 3:

City:

County:

State:

Alternate Names

[View Phone Information](#)

☐ In City Limit

Fields	Description
Customer Status	Customer statuses are <i>Active</i> , <i>Inactive</i> , and <i>Template</i>
Copy from Customer	Select Link to choose information from an existing customer to copy
Level	Select a level to indicate the level of processing that can occur for the customer
Type	Select a type to identify customer categories in reports
Short Name	Enter a name to appear on pages when there is not room for the full name
Currency Code	Select a currency code for the customer
Rate Type	Enter a rate type to convert all transaction currencies to the currency code that you select
Roles	Select the role for the customer
Support Team	Select to designate the team that supports the ship to customer. Also select a default team
Address	All customer roles must have an associated primary address. You can enter one address for all of the customer roles or separate addresses for each role.

3) Navigate to the General Information page: Grants → Sponsors → General Information

General Info		Details	Attributes	Bill To Options	Ship To Options	Sold To Options	Miscellaneous General Info
SetID: STATE		Sponsor: 000					
Level:	<input type="text"/>			<input type="checkbox"/> Federal	<input type="checkbox"/> Allow CO-PI's		
Sponsor Type:	<input type="text"/>			<input type="checkbox"/> US Flag Carrier Required	<input type="checkbox"/> Allow Multiple PI's		
Federal Sponsor Type:	<input type="text"/>			<input type="checkbox"/> Grants.Gov Sponsor	<input checked="" type="checkbox"/> Show Indirect Expenses on FFR		
Program Type:	<input type="text"/>			<input type="checkbox"/> Foreign			
Reports To Sponsor:	<input type="text"/>						
CFDA Number:	<input type="text"/>	Cost of Living Increase Pct:	<input type="text"/>				
Sponsor Base:	<input type="text"/>	Sponsor Salary Cap:	<input type="text" value="0.00"/>				
<input type="checkbox"/> Letter of Credit							

4) Enter the appropriate value into the following field

Fields	Description
Sponsor Salary Cap	If there is not a published salary cap an amount must be entered to add personnel to the grant budget. Enter a large amount, such as \$10,000,000, to avoid issues when budgeting personnel on a grant.

- Use the additional tabs, *Attributes*, *Bill To Options*, *Ship To Options*, *Sold To Options*, and *Miscellaneous General Info*, to add/update information about the grant
- Depending on which role is selected, additional information for the *Bill To Options*, *Ship to Options*, and *Sold To Options* may be needed